

Southwest Care Management Coalition Work Plan

Tasks to be Accomplished			Person(s) responsible	2006												2007						
				Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul		
A.	Develop process for consumer input		Consumer Input Wk Gp																			
	a	assess current degree of consumer and stakeholder participation in current long term care system	Consumer Input Wk Gp																			
	b	identify and create opportunities in the planning process for consumer and stakeholder participation	Consumer Input Wk Gp																			
	c	Identify specific consumers/stakeholders to participate in planning process, program development, and program oversight	Consumer Input Wk Gp																			
	d	develop training to enhance meaningful consumer/stakeholder participation	Consumer Input Wk Gp																			
	e	structure program administration and governance so as to be transparent and accessible to consumers/stakeholders	Consumer Input Wk Gp																			
	f	create opportunities for consumers and consumers representatives to participation in quality management	Quality Wk Gp																			
	g	create opportunities for consumers and consumers representatives to participation in the grievance and appeals process	Quality Wk Gp																			
	h	coordinate planning activities with project to strengthen consumer and stakeholder involvement with UW-Extension project	Project Manager																			
B.	Hire project manager		Coalition Partners		X																	
C.	Identify communication methodology to keep partners informed		Coalition Partners																			
D.	Revise grant budget and submit to DHFS		Project Manager		X																	
E.	Develop comprehensive written plan for managed care expansion in SW WI (Development of CMO)		Coalition Partners																			
	a	Discuss plan with DHFS regarding requirements for planning	Project Manager																			
	b																					

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F.	Develop plan to build ownership County by County	Coalition Partners																	
G.	Develop governance structure	Governance Wk Gp																	
a	Develop timeline and strategies for governance that is satisfactory to all who will share legal and/or financial risk including:	Governance Wk Gp																	
1	Define purpose, mission of the CMO Coalition to provide philosophical framework for governance development	Governance Wk Gp																	
2	operating agreements	Governance Wk Gp																	
3	by-laws and protocols for business between partners	Governance Wk Gp																	
4	mission statement and strategic plan for the entity	Governance Wk Gp																	
5	steering and oversight committees, including consumer and stakeholder meetings	Governance Wk Gp																	
b																			
H.	Analyze fiscal impact of ADRC and CMO on current DSS, HS, HHS, Aging, Public Health Agencies	<i>TMG?</i>																	
I.	Analyze historical costs of waiver participants	<i>TMG?</i>																	
J.	Develop an operational ADRC	ADRC Wk Gp																	
a	Identify local collaborators, including functions, staff and financial resources for proposed ADRC operation	ADRC Wk Gp																	
b	Identify gaps in resources and develop plan for addressing needs to cover all functions of a fully operational ADRC.	ADRC Wk Gp																	

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c	Identify and agree to areas of regional collaboration.	ADRC Wk Gp																	
d	Determine governance structure, including assurance of appropriate separation from CMO	ADRC Wk Gp																	
e	Secure, install and develop software for resource databse and client tracking, and begin developing policies/procedures for information management.	ADRC Wk Gp																	
f	secure and install telephone system with capability for volume of calls in/calls out and emergency response ("warm transfer" and after-hours message capability)	ADRC Wk Gp																	
g	Develop staffing plan for ADRC functions (I & A, Options Counseling, Family Care Elig. Det., Benefit Spec) that meets requireemnts for staff qualitifications, including formal job descriptions, plan for readiness to serve all target groups, plan for obtaining needed certifications or specialized training	ADRC Wk Gp																	
h	Develop plan for marketing & outreach/public education	ADRC Wk Gp																	
I	Develop understanding of and readiness for 100% time reporting using current methodology, including staff training and support	ADRC Wk Gp																	
j	Develop plan for Pre-Admission Consultation (PAC) capability, including providing information and in-service training to providers and partnering with them to develop referral protocols.	ADRC Wk Gp																	
k	Develop communication, coordination, referral protocols, policies and/or MOU's with essential public and private services such as ESS, Soc Sec, MH/AODA services, DVR, Independent Living (ILC's), Medical Clinics, APS, etc.	ADRC Wk Gp																	

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l m n o p q r		Plan for development of transition services for young adults with schools and other appropriate community agencies (DVR, ILC, Children with Disabilities)	ADRC Wk Gp																	
		Plan for development of early intervention & prevention services	ADRC Wk Gp																	
		Develop policy, procedure and training for Functional Screen quality	ADRC Wk Gp																	
		Develop Access Plan for Family Care, including policy, procedure and MOU's for functional and financial eligibility determination and enrollment; enrollment consultant , urgent services; disenrollment; and the role of the RC in annual reviews and change in condition screens	ADRC Wk Gp																	
		Work with CMO Work Group to develop plan for "roll-over" of COP/CIP/Waiver consumers	ADRC Wk Gp																	
		Work with CMO Work Group to develop a phase-in plan for eliminating the wait list and serving new consumers	ADRC Wk Gp																	
		Identify location for ADRC and set up office operations, including a public resource area	ADRC Wk Gp																	
K.	Achieve readiness to respond to RFP		Coalition Partners																	
	a	Discuss "readiness" with DHFS--what is the definition	Project Manager																	
	b																			
L.	Create timeline for achieving interdisciplinary teams		Interdisciplinary Teams Wk Gp																	
	a	Develop outcome-based philosophy tools	Interdisciplinary Teams Wk Gp																	

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b	Develop process to monitor contract requirements for initial contacts, assessment, plans, and ongoing contacts	Interdisciplinary Teams Wk Gp																	
c	Develop member centered planning process	Interdisciplinary Teams Wk Gp																	
d	Develop individualized service planning process	Interdisciplinary Teams Wk Gp																	
e	Provide training on the Resource Allocation Decision (RAD) methodology	Interdisciplinary Teams Wk Gp																	
f	Develop comprehensive training plan for care management staff	Interdisciplinary Teams Wk Gp																	
g	Develop plan to assure capacity of SW and RN staff during initial and on-going operation of CMO	Interdisciplinary Teams Wk Gp & Fiscal Wk Gp																	
h																			
i																			
M.	Establish enrollment/disenrollment protocols	ADRC, IDT, and Fiscal Wk Gps																	
a																			
b																			
N.	Establish timelines for consumer safety and risk	Quality Wk Gp																	
a																			
b																			
O.	Establish process for staff training	Coalition Partners																	
a																			
b																			
P.	Identify needs, assessment of current providers and creation of a Provider Network.	Provider Network Wk Gp																	

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	a	Plan with providers to assure appropriate workforce and provider pool for capacity, quality & options																	
	b	Develop minimum competencies for providers																	
	c	Develop plan to provide training for providers																	
	d	Create contract language for subcontracts with providers																	
	e	Develop contract monitoring protocols																	
Q.		Complete a needs assessment for administrative and financial management tools and competencies necessary for a CMO and strategies to learn mgmt techniques																	
	a																		
	b																		
R.		Develop an implementation timeline for the development of necessary administrative and financial functions																	
	a	claims and payment system																	
	b	benefit coordination																	
	c	utilization management																	
	d	financial analysis																	
	e	develop procedures for monitoring consumer cost sharing																	
	f																		

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S.	Create business plan/operating budget	Fiscal/IT Wk Gp																	
T.	Develop plan for enrollment of current persons on waiting lists	Interdisciplinary Teams Wk Gp & Fiscal Wk Gp, and ADRC Wk Gp																	
	a																		
	b																		
U.	Identify essential information and technology (IT) and reporting tools	Fiscal/IT Wk Gp																	
	a encounter reporting	Fiscal/IT Wk Gp																	
	b																		
	c																		
V.	Develop competencies to carry out IT functions in managed care including procurement/development of IT tools	Fiscal/IT Wk Gp																	
	a																		
	b																		
W.	Identify needs as it relates to quality assurance and quality improvement to services directly related to members	Quality Wk Gp																	
	a																		
	b																		
X.	Implement systemic quality management strategies including discovery, remediation, and quality improvement	Quality Wk Gp																	
	a																		
	b																		
Y.	Establish a grievance and appeal system	Quality Wk Gp																	
	a																		
	b																		

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Z.	Develop plan to implement SDS	Quality Wk Gp & Interdisciplinary Wk Gp																	
	a																		
	b																		
AA.	Establish a risk reserve and a business solvency plan	Coalition Partners & Fiscal Wk Gp																	
	a Develop a timeline and financing strategy to achieve the required risk reserve	Coalition Partners & Fiscal Wk Gp																	
	b Create and document methodology to achieve and sustain business solvency	Coalition Partners & Fiscal Wk Gp																	
	c																		
AB.	Coordinate with acute and primary care	Interdisciplinary Teams Wk Gp																	
	a conduct local needs assessment and provider education	Interdisciplinary Teams Wk Gp																	
	b determine level of managed care--integrated acute and primary care or coordination with acute and primary care	Coalition Partners																	
	c create plan to include acute and primary care health providers in managed long-term care planning including coord of benefits	Coalition Partners & Interdisciplinary Wk Gp																	
	d develop and coordinate with behavioral health and AODA services	Interdisciplinary Teams Wk Gp																	
	e																		
AC.	Create plan to coordinate with adult protective services as defined in WI statutes 51, 55, and 880	Coalition Partners																	
	a																		
	b																		
AD.	Produce required reports for planning grant	Administrative Assistant																	
	a First report due 90 days after first payment	Administrative Assistant																	
	b Report due July 2006	Administrative Assistant																	

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	c	Report due October 2006	Administrative Assistant																	
	d	Report due January 2007	Administrative Assistant																	
	e	Report due April 2007	Administrative Assistant																	
	f	Report due July 2007	Administrative Assistant																	
AE.	Determine ESS Readiness		Coalition Partners																	